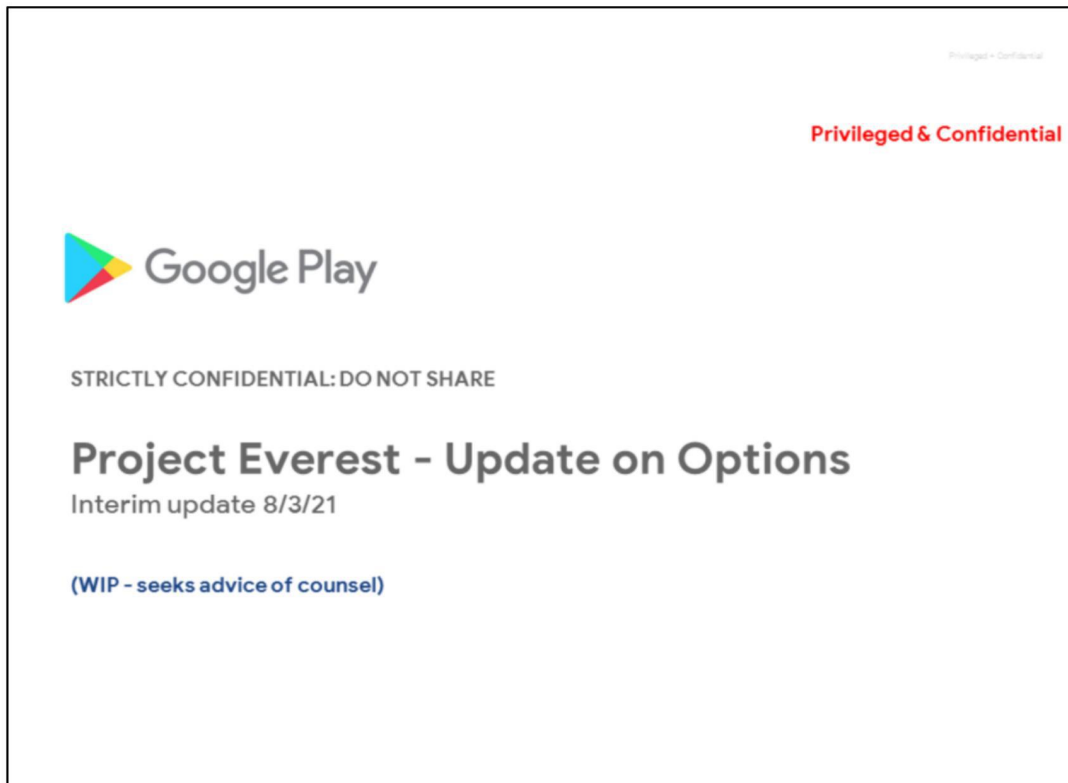
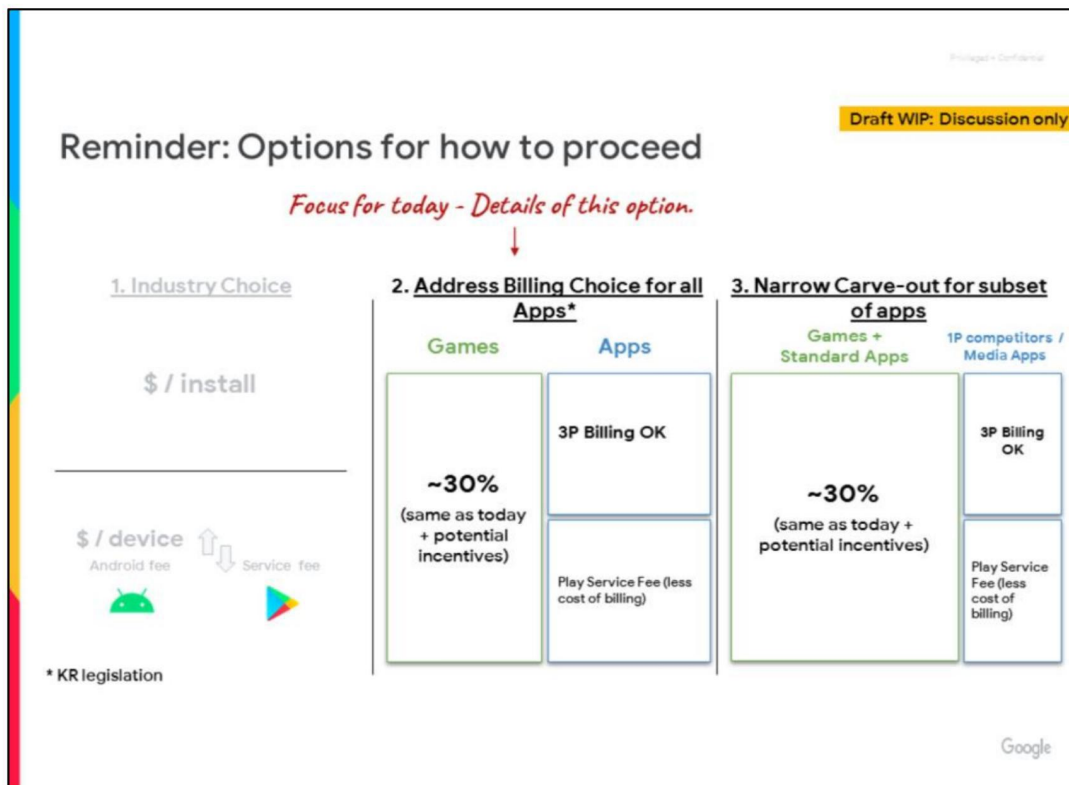


**EXHIBIT 9**  
**PUBLIC REDACTED VERSION**



Last year's context slides: [https://docs.google.com/presentation/d/1xy0PMiNgc1B-ywU27Ar-VvjAepCJv3fZp3n5W1B40PQ/edit#slide=id.g62584bfae9\\_13\\_335](https://docs.google.com/presentation/d/1xy0PMiNgc1B-ywU27Ar-VvjAepCJv3fZp3n5W1B40PQ/edit#slide=id.g62584bfae9_13_335)



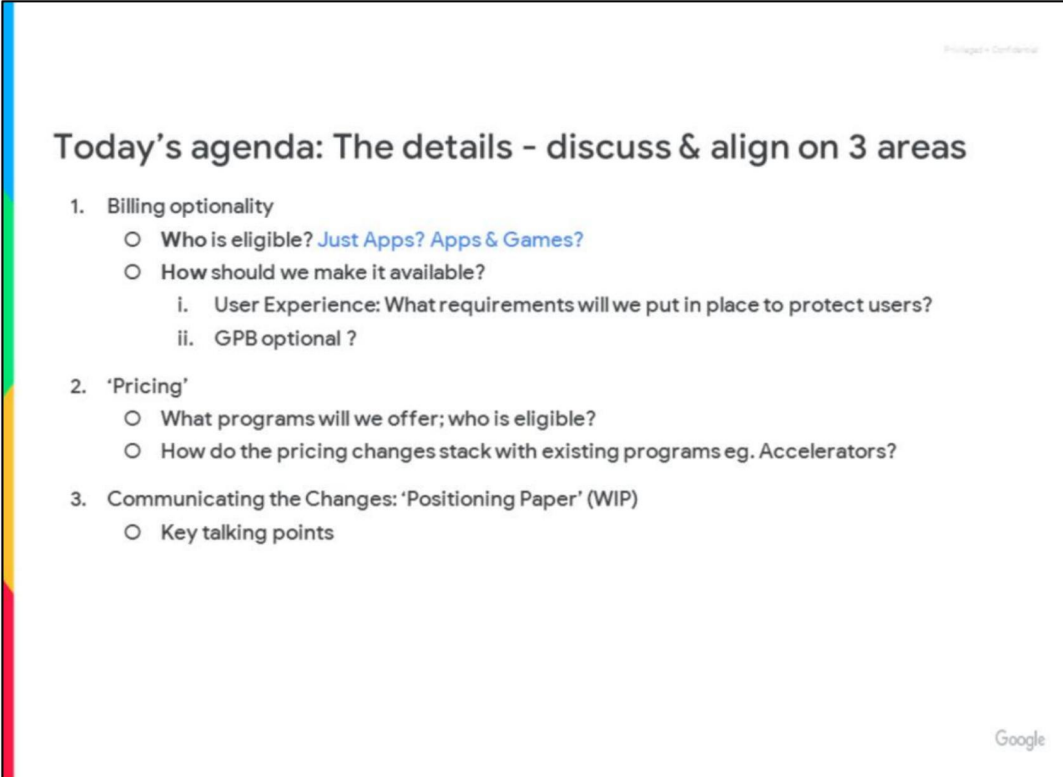
*Kara*

*In previous short discussion, highlight three approaches. Ruled out a more 'industry changing' approach of more radically changing our service fee approach to, for example, charge for installs or charge OEMs per device.*

*Focus today on approaches 2&3, where 3 is - in reality - a more narrow version of approach 2.*

*Considering two key things in this approach 1. Who is eligible for Billing optionality?*

*2. How do we charge developers using their own billing for our services? What other pricing changes/incentives for developers?*



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## Today's agenda: The details - discuss & align on 3 areas

1. Billing optionality
  - Who is eligible? *Just Apps? Apps & Games?*
  - How should we make it available?
    - i. User Experience: What requirements will we put in place to protect users?
    - ii. GPB optional ?
2. 'Pricing'
  - What programs will we offer; who is eligible?
  - How do the pricing changes stack with existing programs eg. Accelerators?
3. Communicating the Changes: 'Positioning Paper' (WIP)
  - Key talking points

Google

Paul

1. We're here because there are numerous potential actions against Play's business model including in Korea (action to disallow requiring Play Billing is imminent) EU / US, where the EC SO, DMA, and US legislation and lawsuits are in flight.

2. The challenges center on Choice and Billing, and we will talk through our thinking for how to respond to these challenges.

On choice, we recommend offering some devs the ability to use their own billing - we'll charge them a service fee the cost of billing.

Note that while some devs really to want to use their own billing, we believe a bunch of choice arguments are actually pricing concerns. So we will need to address pricing.

On pricing, we recommend a segmented, targeted approach (a one size does not fit all approach) addressing specific app categories and situations (for instance, games, subs, active buyers with specific duration).

3. We'd like to discuss some options for how aggressively we want to make these changes.

KR compliance approach - Conservative approach, which is to comply with the Korean law, allow alternate billing & charge a service fee but otherwise make no changes. Without addressing pricing, we'd expect that we'll see a lot of pressure particularly on pricing very quickly in Korea, and for Korea to influence action in other markets.

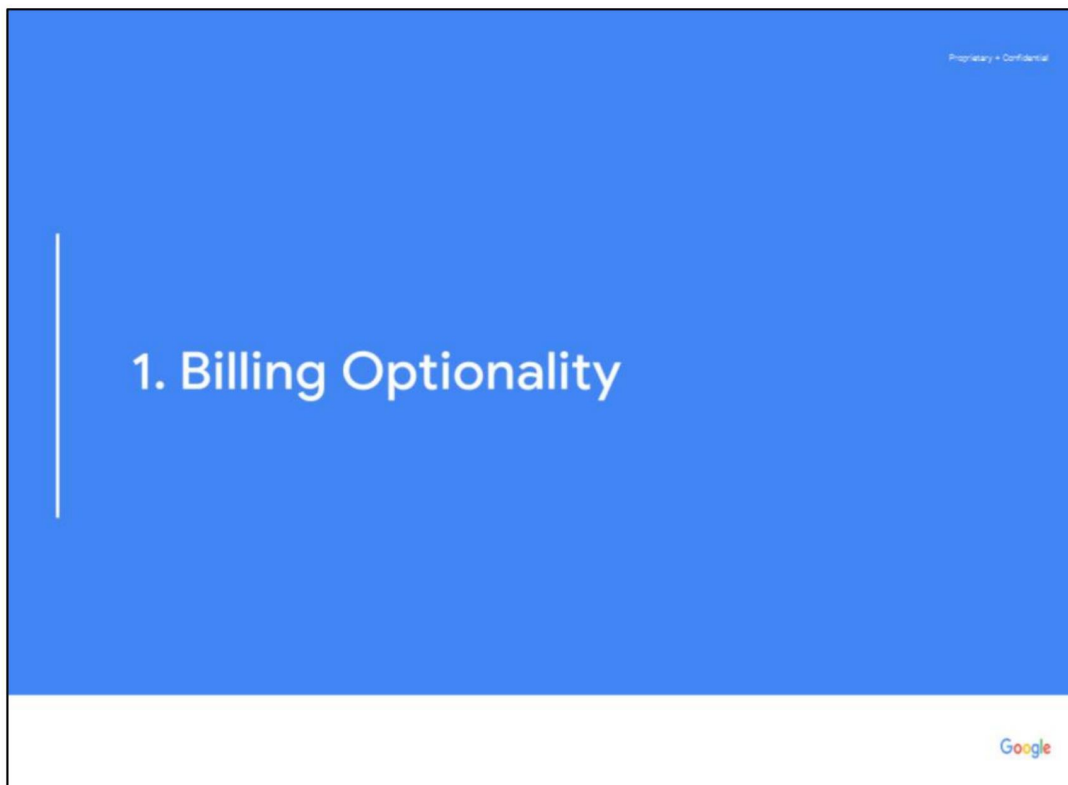
Focus on apps - This approach addresses the major agitation of Apps developers



wanting to use their own billing and seeking lower service fees - reflecting their specific vertical margin challenges.

More radical focus on both apps & games offering more choice and lower service fees. This more radical approach would provide the biggest solve. But it may not be necessary to do immediately, and may not solve all agitation.

The next few slides will cover some key context, and we'll dive in to choice, pricing and these rollout options.



Paul to cover this section

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## Optionality: Apps only, or All (apps & games) devs

### Apps Only

**More targeted first response to apps, preserves option value**

- More time to ensure strong overall approach prior to opening to games
- Help influence outcomes outside of KR for Games

**Games are different**

- Industry precedent with integrated billing
- Important safety features eg. budgeting, family link
- Currently less games agitation

**Concern:** Apps-only likely likely temporary

- Likely non-compliant in KR & US if legislation passes
- Continued agitation from some games devs (eg. Epic) put pressure on 'market definitions'

### Apps & Games

**Consistency on choice is valuable now**

- Get ahead of the primary "choice" complaint, decouples billing & price
- Enhances Android/Play openness / choice narrative
- Maximizes our influence with legislation
  - Directly responsive (KR, US, DMA)
  - May help influence legislators to consider a multi-platform approach to gaming (eg. inc. console)
- Clear and simple message & approach for developers

**Concern:** Focus will shift to price... but we have strong arguments

- "One size does not fit all" best addressed on price
  - **Apps:** Will address pricing
  - **Games:** Strong arguments to justify price
- Developers have other, off Play, distribution options

**Concern:** Broadest user impact, option value lost

- Not addressing games likely temporary
- Impact can be mitigated by continuing to deliver value, keeping devs on GPB

Google

*Risks of this approach:*

*Lost opportunity to test & learn in KR first*

*Legislative/regulatory agitation may shift to mechanic for optionality and price (no solve on price for games)*

*Game developers de-integrate*

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## We believe there are many strong reasons for developers to continue to use Play Billing

### Reasons for Remaining on GBP

- *No embedded price discount* with Billing optionality
- *Wide range* (including DCB and gift cards) and *global market coverage of FOPs* available in one billing system through on GBP. Frictionless access to *~600M FOP'ed users* worldwide
- Important user billing features only available on GBP including full family features/protections, customer support
- Benefit from some programs only possible through Play Billing eg. Play Points redemption
- [FUTURE] Benefit from *new/upcoming games roadmap & features* using GBP inc. Games Platform, GP3 (TBC)

Google

Kara

*Dimensions of pricing . . .*

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**We contribute significant value across Play and Android to ALL devs...so we will continue to collect a service fee in a way that continues to align Play and dev incentives - regardless of billing choice**

	Services ex. Billing	Full service
<b>Apps &amp; Games</b>	<ul style="list-style-type: none"> <li>● Free, easy to use app development tools</li> <li>● Global distribution &amp; discovery (&gt;2B 30DAUs globally)</li> <li>● Global user acquisition, engagement, and retention mechanics/tools, including Points earn</li> <li>● Data analytics and benchmarking data</li> <li>● Trusted &amp; safe ecosystem</li> <li>● Many safety features &amp; protections, including Family link</li> </ul>	<ul style="list-style-type: none"> <li>● Seamless &amp; easy user payments capability w/Points redemption, fraud protection &amp; payments customer support</li> <li>● Family library</li> </ul>
<b>Apps (Subs)</b>	<ul style="list-style-type: none"> <li>● Launch &amp; subscription management support &amp; tools</li> <li>● Multi-platform investment for connected Android devices inc. TV, Wear</li> </ul>	
<b>Games (primarily IAP)</b>	<ul style="list-style-type: none"> <li>● Pre-registration and launch support; liveops support through title lifecycle, including Play funded targeted promotions (credit, points)</li> <li>● Brand/IP protection - the 'real thing'</li> <li>● Games performance drivers: High quality game recommendations, high quality graphics drivers</li> <li>● Multi-platform gaming capability inc. Dynasty, B*</li> <li>● Future - Enhanced gaming community (TBC)</li> </ul>	<ul style="list-style-type: none"> <li>● Safety features: Budgeting controls</li> <li>● Future (TBC) - Play Games Platform</li> <li>● Future (TBC) - GP3/Additional developer features</li> </ul>

Google

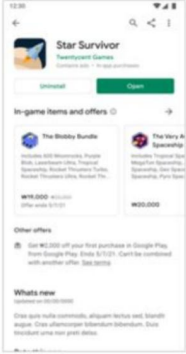
Kara

*Dimensions of pricing . . .*

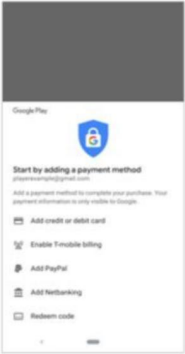
Id	Date	Text
1	08/03/2021 20:53:12	@pfeng@google.com @marchak@google.com Please add/amend as needed. <span>Privileged - Confidential</span>
1	08/03/2021 23:55:06	Exec review FB: This is very Play centric. Layer in broader Android considerations.

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# Focus on user experience / trust across the purchase lifecycle



**Pre-Install**  
(e.g. Details Page)



**Checkout**  
(e.g. Consistent & trusted UX, access to FOPs, transactional security)



**Post Purchase**  
(e.g. Sub Center, Order History, Receipts, Trial Notifs, gUP)

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GOOG-PLAY-007819071

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We'll require 3P API for T&S, but the bar will be lower.

	Feature	Solution	
Pre-Install	App details	Inform: users app doesn't use Play Billing, esp Parents	●
Checkout / Cart	Trust / Secure Transactions	Policy: Updated policy (eg. MSFT) to mandate min. security requirements, part of eligibility.	●
	FOPs / Gift Cards	Not available	●
	Parental Approvals	Inform: parent when non-GPB app downloaded, purchase completed Product: Inline ask-to-buy or purchase declines (TBD)	●
	Budgeting	Inform: User that budgets are set Product: Notify users when they exceed their budget	●
	Always-on purchase authentication	Not available	●
	Play Points	Product: Can earn points, cannot spend.	●
	Comms (trial expirations, renewals)	Inform: Inform user in store UI that app does not use Play Billing.	●
Post Purchase / Support	Order / Subs Management	Policy: Mandate apps with 3P billing must have easily accessible in-app OH & cancellation. Product: Simplified version of OH & Sub Center (pointing to dev app for details / management.) Keep uninstall notif for active subs.	●
	Customer Support	Policy: Enforce min-support standards, part of eligibility.	●
	Family Library	Not available for in-app purchases	●

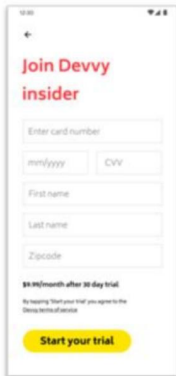


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Draft WIP: Discussion only

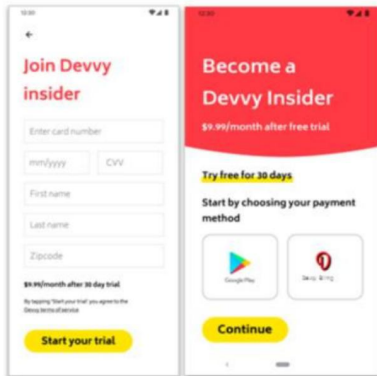
## For Discussion: Should we offer 3P billing standalone or allow GBP as optional?

**Option 1: 3P in-app billing - Standalone**



- Play Billing *is not* required and is not available to developers using their own billing
- Developer uses their own *billing in the app*

**Option 2: GBP is optional; Dev chooses standalone or side-by-side**



- Play Billing *is not* required, but is *optional*
- Developer can use their own *billing in the app*
- Developer can also *choose to offer their billing alongside GBP*. User chooses which to use.

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Debated the relative merits of both options; seeking input today

	Pros	Cons	Choose this option to . . .
1. 3P billing (GPB optional)	<ul style="list-style-type: none"> <li>● If utilized, user gets access to full suite of GPB features:               <ul style="list-style-type: none"> <li>○ Trust and safety, FOPs, gift cards, Points...</li> </ul> </li> <li>● Optimal choice for developers</li> </ul>	<ul style="list-style-type: none"> <li>● Enables more dev arbitrage by FOP type choice; higher uncertainty of costs to Play</li> <li>● More work to build &amp; manage (TBC)</li> <li>● One price in store may be challenged (open question)</li> </ul>	<p><i>Ensure all users can access GPB features, incl. Play Gift cards and Points</i></p>

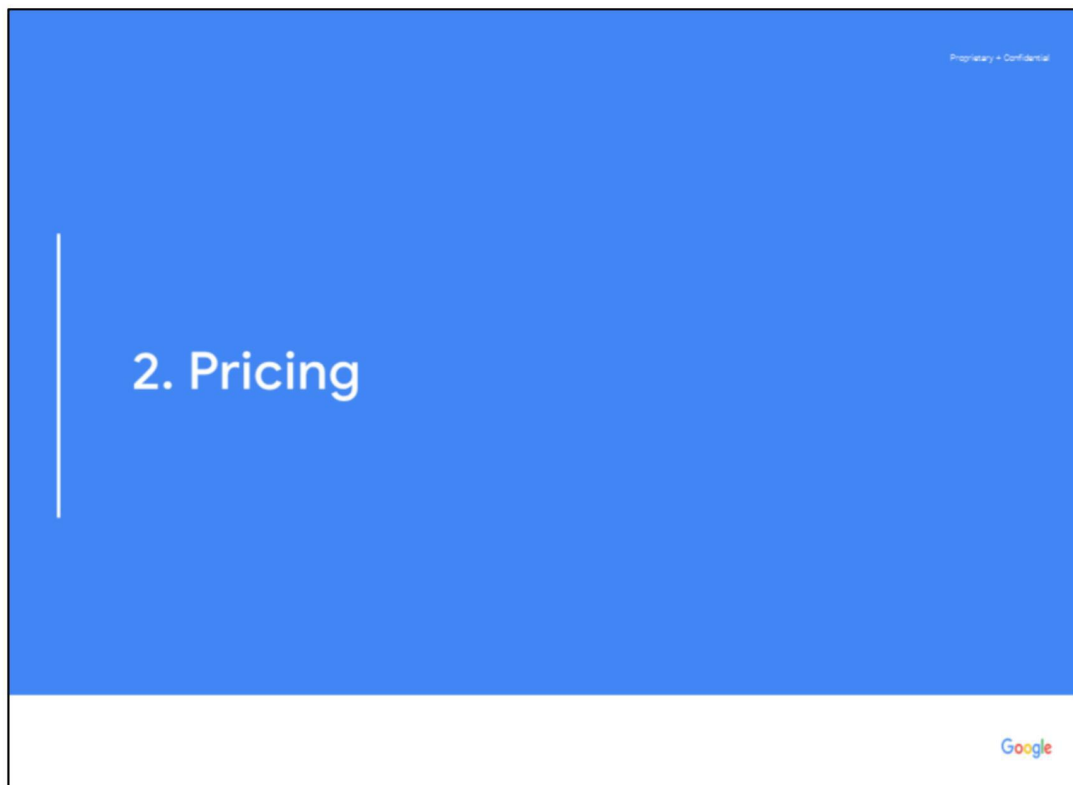
# Redacted - Privilege

NB: Considered 3P billing - GPB required. Not recommended as unlikely to be responsive to legislative intent/requirement

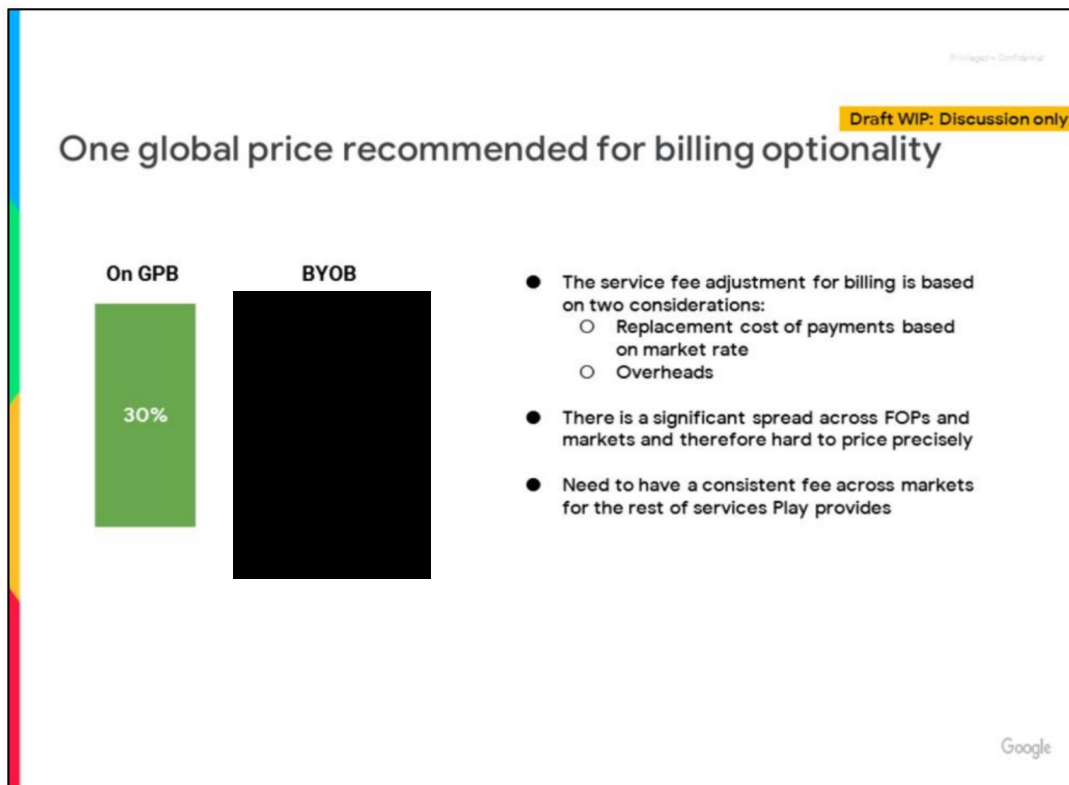
Google

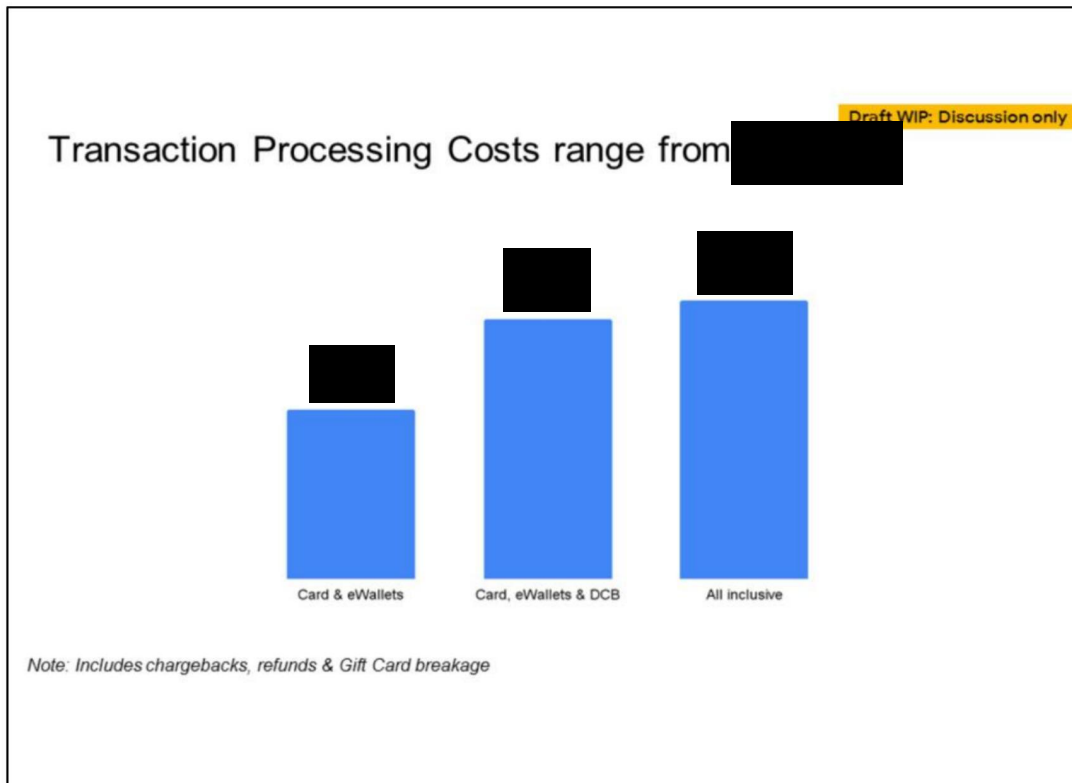
Other options considered: Both unlikely to be responsive to legislation  
 Linking > poorer user experience  
 3P billing with GPB required

Id	Date	Text
1	08/02/2021 18:54:01	Not sure this is true? <span>Privileged - Confidential</span>
2	08/02/2021 18:54:01	I was referencing that you'd have more payments flows to manage and user messaging given there are two 'billing flows'. If that's not the case we should remove.
2	08/02/2021 18:57:29	This is only if we include the anti-steering, yes?
3	08/02/2021 18:57:29	If Option 1 requires devs to charge the same price to users opting for GPB or the dev billing then yes. Option 2 is more defensible as this doesn't have that dynamic which is a potential source of agitation and concern. @kghanem@google.com to weigh in.



Kara to cover this section





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## 2 recommended price reductions to accommodate biz models and economics

### Subscriptions

Recognize this is a different business model, justifying different fees

Developer actions tells us 30% unlikely sustainable

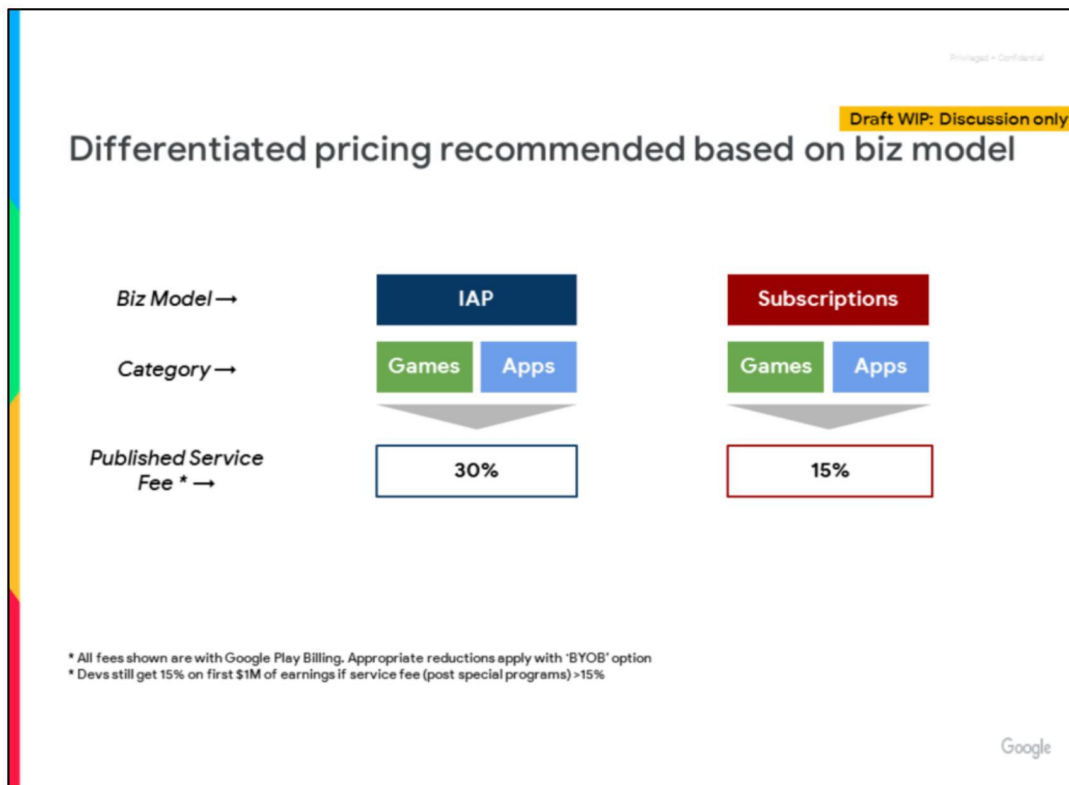
Scaleable & sustainable vs AVP

### Creator Platform Accelerator

Recognize unique economics of emerging segment of apps globally & particularly in KR

Apply economic principles to existing Media Accelerators as applicable.

Google





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## Rationale for adjusting subs to 15% from Day 1

Subscriptions @ 15% from Day 1	
Aligns with Principles	<ul style="list-style-type: none"> <li>● Subscriptions is a different business model (recurring, ongoing content costs, etc)</li> <li>● Competitive response: there are viable alternatives to subscribing with Play (going consumption only)</li> <li>● Consistency: 6 of Top 10 subs apps already at 15% (2 additional targeted in AVP)</li> </ul>
AVP learnings	A more scalable & sustainable approach to administering AVP (\$XXM already approved). AVP can't easily fit into existing Accelerator construct - 4 distinct verticals from first 6 targeted developers
Allyship	Opportunity to find "Friends" by acting first and differentiates from Apple; addresses concerns being voiced consistently from subscription devs
CONS/Risks	<ul style="list-style-type: none"> <li>● Minimizes the value prop for the Media Experience Programs</li> <li>● Still requires accelerators</li> <li>● Games moving to subs based models. Initial <a href="#">POV</a> is the % shift will be small.</li> </ul>
Est. Margin cost	[REDACTED]

Google

Kara

Considering three new programs to address different segment challenges. Subscriptions at 15% from the first purchase. Most straightforward extension of existing subs policy. A more scaled way to address the affordability and value concerns of the likes of devs such as Match. Risk is contagion to IAP. Cost at [REDACTED] assuming some behaviour changes in games [REDACTED] apps; [REDACTED] games) Content Creator program. Suited to growing segment of 'platform' apps such as [REDACTED] who have a large creator platform and share the a significant proportion of their sales with creators (usually published rates).

India program a one-off tailored to current IN market conditions as a short term 'boost', providing investment for market development. Still working through full details, including costing.

---

Potential gives and gets with all these programs.

Other potential programs: Better Togethers, Cloud credits / GVP scaled

Costs:

Content creator: [REDACTED] margin against existing GPB developers, excludes Roblox.

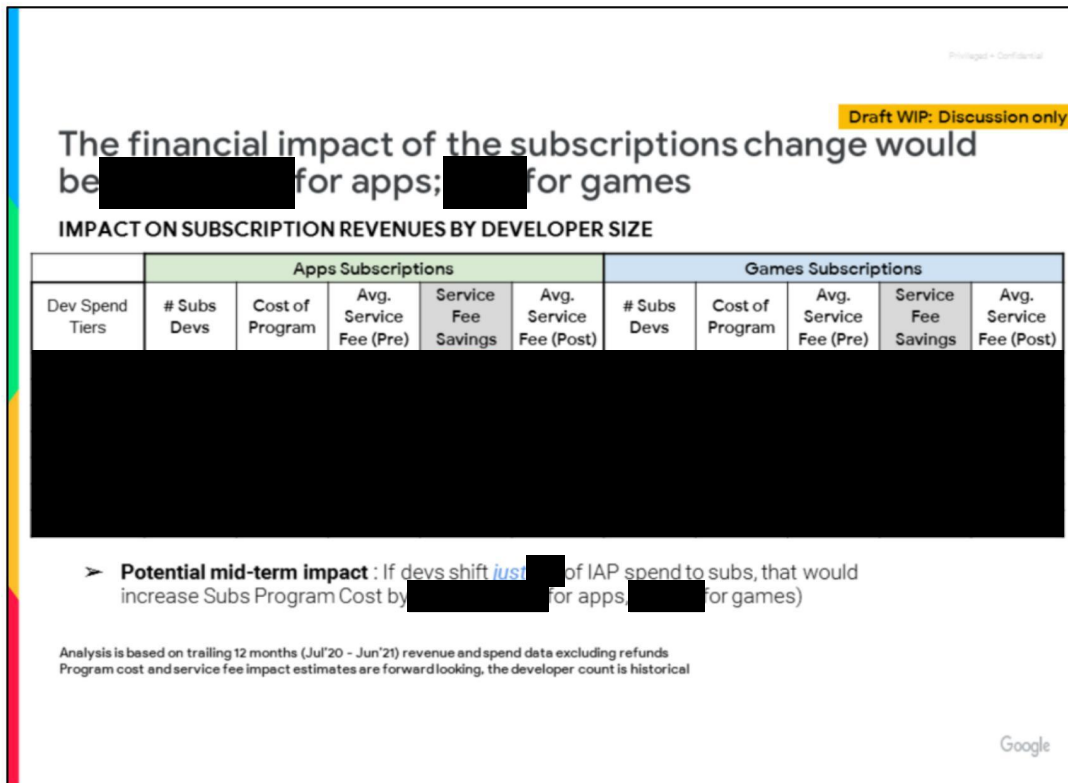
*See Slide 79: Creator Content Program*

*Subs @ 15% immediately: cost is \$zzz for apps + \$zzz for games for a total of \$zzz.*

*Assumes that subscription and IAP spend are unaffected by the new pricing.*

*Notes on figures:*

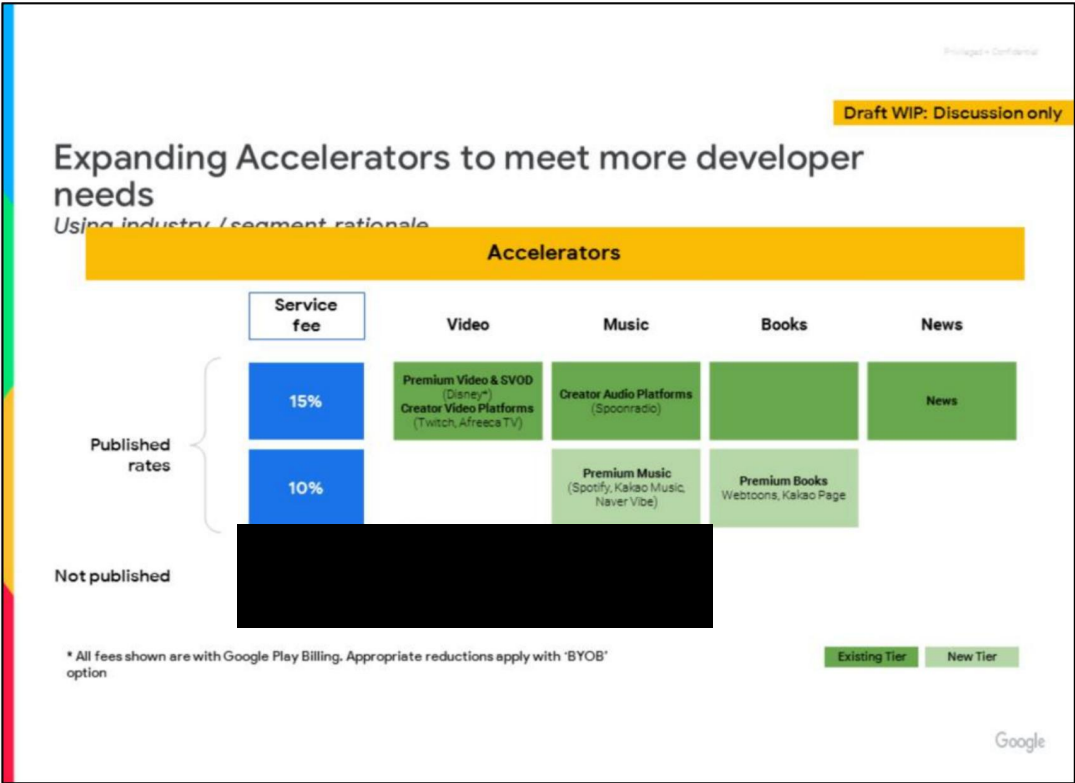
*Subs revenue growth of 45% is the 2 yr CAGR ending in Q2 2021.*



#### Notes:

- 1) The status quo rev share for the smaller tiers does not [REDACTED]... this is because we're pulling in actual enrollment data for Runway, which has less than 100% coverage, and enrollment stats have been stable for several weeks. If Runway enrollment stays where it is, that means that the Subs Give would be a VERY effective way of dropping rev share for the unenrolled apps devs... but not as effective for games. It also means the [REDACTED] for [REDACTED] for games for the smallest tier would be a real cost for Play if this program is adopted.
- 2) The subs give will be [REDACTED] for apps vs. games... not only is the notional give [REDACTED] the size [REDACTED] for apps vs [REDACTED] for games), but the rev share reduction for apps devs with subs is [REDACTED] compared to [REDACTED] for games. For this reason, it's fair to say that the subs give is largely targeted to apps devs
- 3) the most impacted tiers are actually [REDACTED] and [REDACTED] as we see the subs give decline in relative richness for upper tiers [REDACTED] I have a hypothesis for this: Runway sets status quo rev share low for the smallest tiers, while the largest apps tiers benefit the most from the 12mo+ sub give already (note their low status quo rev share). For this reason, the subs program seems to target the "middle class" apps devs.

Id	Date	Text
4	08/03/2021 18:04:32	Thanks for this Brian. Is the relatively smaller reduction in the larger devs also driven by the fact they may already be benefiting from Media accelerator programs at 15%?
1	08/03/2021 19:42:38	<p>@karabailey@google.com  @joshconnor@google.com  @karenshe@google.com  @shamininair@google.com</p> <p>Hi all- this is the first pass of the impact of the subs program by developer tier. There are several things that stand out:</p> <p>1) The status quo rev share for the smaller tiers does not = [REDACTED]. this is because we're pulling in actual enrollment data for Runway, which has less than 100% coverage, and enrollment stats have been stable for several weeks. If Runway enrollment stays where it is, that means that the Subs Give would be a VERY effective way of dropping rev share for the unenrolled apps devs... but not as effective for games. It also means the [REDACTED] for [REDACTED] for games for the smallest tier would be a real cost for Play if this program is adopted.</p> <p>2) The subs give will be [REDACTED] for apps vs. games... not only is the notional give [REDACTED] the size [REDACTED] for apps vs [REDACTED] for games), but the rev share reduction for apps devs with subs is [REDACTED] compared to [REDACTED] for games. For this reason, it's fair to say that the subs give is largely targeted to apps devs</p> <p>3) the most impacted tiers are actually [REDACTED] and [REDACTED] as we see the subs give decline in relative richness for upper tiers [REDACTED]. I have a hypothesis for this: Runway sets status quo rev share low for the smallest tiers, while the largest apps tiers benefit the most from the 12mo+ sub give already (note their low status quo rev share). For this reason, the subs program seems to target the "middle class" apps devs.</p> <p>Note- I still have to add the "behavior change impact" section on the bottom. I'll finish that tomorrow.</p> <p>Please let me know if you have any questions.  _Reassigned to Josh OConnor_</p>
2	08/03/2021 19:42:38	You're correct. The media accelerator devs are likely affecting the metrics for the largest app developer group. Unfortunately it's hard to query this group directly (given there is no "special programs" flag in our system), so it's hard to tell how much they pull down the status quo rev share for that tier. Still, those devs would not contribute to the subs program cost in this slide given how we calculate cost



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## Rationale for Content Creator Accelerator

**Play keeps 30% of Net**

<b>Eligibility</b>	Published % shared with creators Supports >1000 creators Over 50% of income is from creator content
<b>Aligns with Principles</b>	Play has always intended to keep 30% of what an app makes. Our Media Experience program was a step in that direction, however, we've realized: <ul style="list-style-type: none"> <li>● The rates need to vary with the app / industry</li> <li>● Emerging creator platforms require us to broaden the reach of the media program</li> </ul>
<b>Allyship</b>	Opportunity to align with new, emerging segment of developers that may become escalations due to policy enforcement
<b>CONS/Risks</b>	<ul style="list-style-type: none"> <li>● Other developers face similar margin concerns e.g., IP licensing</li> <li>● Not all developers currently publish % shared w/ creators. Would expect them to publish</li> </ul>
<b>Est. Margin cost</b>	very few of these devs using GPB today

Google

Kara

Considering three new programs to address different segment challenges. Subscriptions at 15% from the first purchase. Most straightforward extension of existing subs policy. A more scaled way to address the affordability and value concerns of the likes of devs such as Match. Risk is contagion to IAP. Cost at [REDACTED] - assuming some behaviour changes in games [REDACTED] apps; [REDACTED] games) Content Creator program. Suited to growing segment of 'platform' apps such as [REDACTED] who have a large creator platform and share the a significant proportion of their sales with creators (usually published rates).

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Costs:

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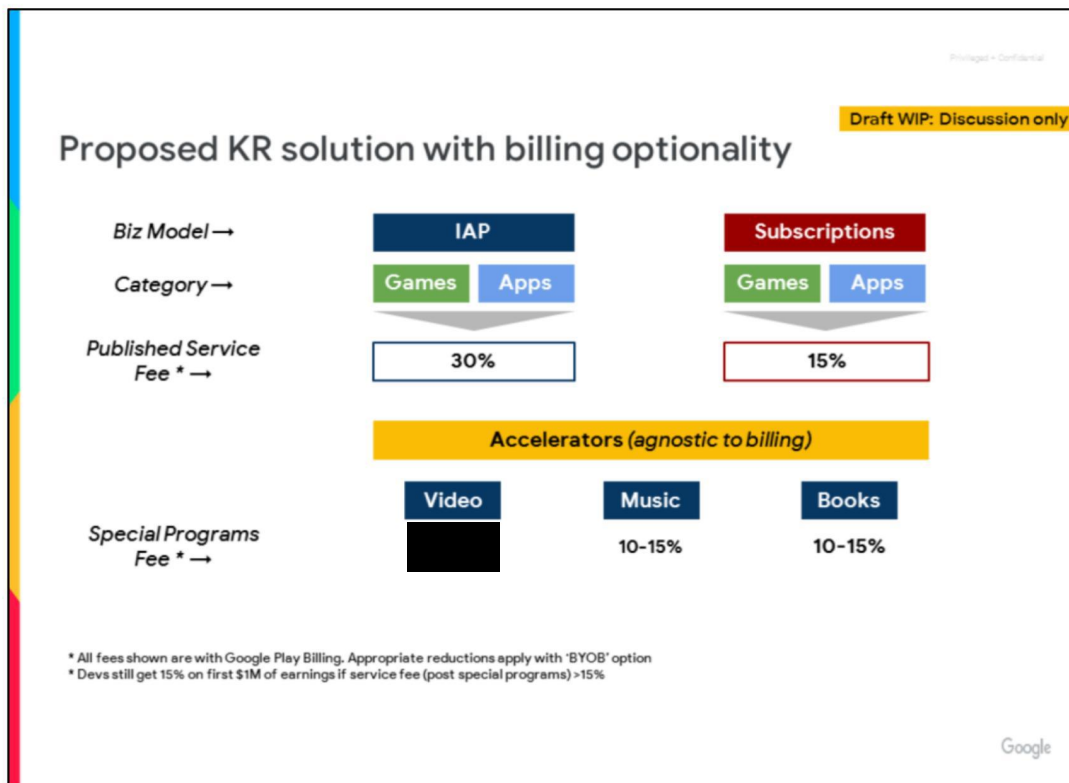
*See Slide 79: Creator Content Program*

*Subs @ 15% immediately: cost is \$zzz for apps + \$zzz for games for a total of \$zzz.*

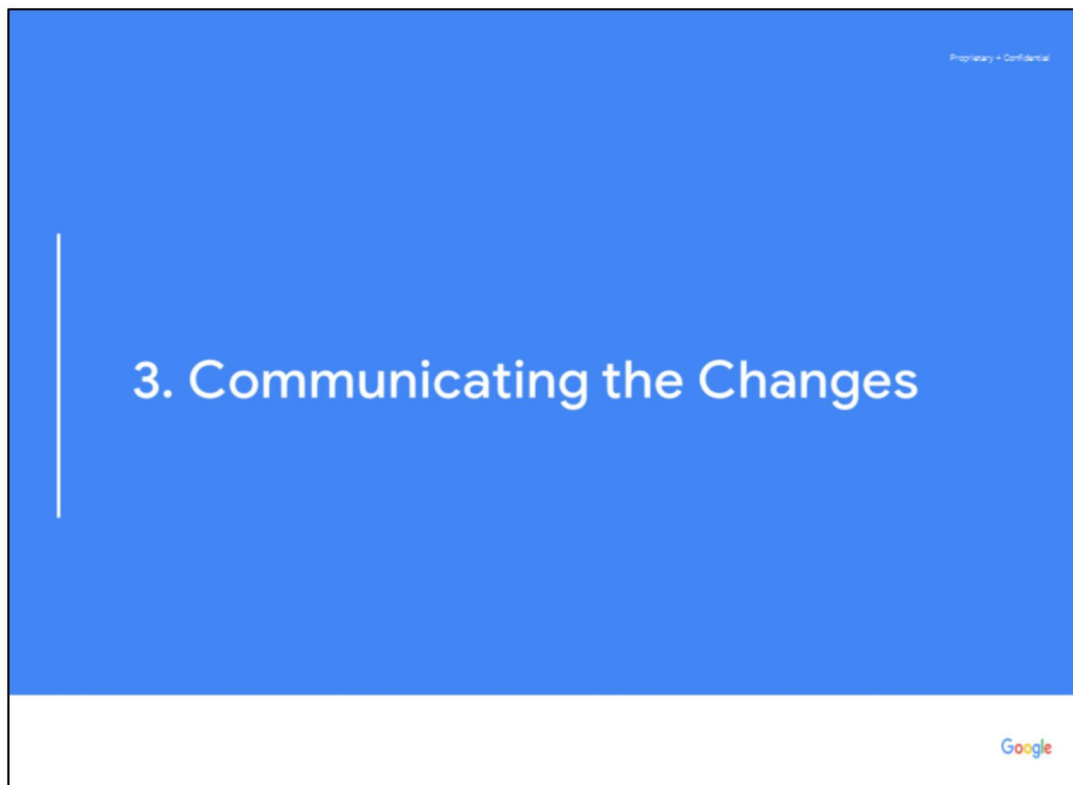
*Assumes that subscription and IAP spend are unaffected by the new pricing.*

*Notes on figures:*

*Subs revenue growth of 45% is the 2 yr CAGR ending in Q2 2021.*







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## Positioning Paper - six simple principles

### Introduction

We built Android and Google Play on a foundation of choice and openness that has expanded billions of consumers' access to information and created untold opportunities for companies of all sizes to build and scale global businesses.

It isn't easy to build and develop platforms that do so much for the world. We're in 190 countries, on 2-3 billion devices, supporting over a million developers. That's in partnership with X mobile carriers, X payments platforms, and 13,000 OEMs to bring Android and Google Play to life for users around the world. And we scan 100 billion apps each day to keep users safe from malware and other abuse.

There's an important public policy debate unfolding around the world about the role of mobile app stores. These are the principles that drive our development of Android and Google Play, and that we hope can contribute to policymaking in this space.

Google

Id	Date	Text
1	08/04/2021 18:17:52	if you like you could add our most recent public statement about lifetime payouts to developers: >\$120B
1	08/04/2021 18:17:52	Good idea, Christian. We'll add that to the next revision.

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## Positioning Paper - six simple principles

1. **We believe that mobile platforms generate value that is worth paying for.**

It's no small undertaking to build and evolve a global platform serving billions of consumers and millions of companies of all sizes. That's value worth paying for.

2. **We believe in an open mobile platform whose financial success is aligned with that of our developers and users.**

Others sustain their platforms by charging high licensing fees or selling expensive devices. We're different. Android is an open platform and we make our services available for free, recouping our costs in part through the Google Play service fee when a developer completes a sale of digital content. We don't succeed unless others succeed.

3. **We believe consumers should be able to choose where to find and buy great apps and games.**

Mobile platforms should let consumers get their apps and games directly from developers or through app stores. Platforms should let multiple app stores compete for consumers' business. Operating systems should keep users safe, but shouldn't interfere with consumer choice.

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## Positioning Paper - six simple principles

**4. We believe developers should be able to choose how to distribute and sell their products and services.**

Mobile platforms should support options for developers to reach their audience -- distributing directly to consumers or via an app store. Developers should be able to choose among multiple app stores that compete for developers' business. **[TBD -- And developers should be able to choose how to sell content in their apps.]**

**5. We believe mobile platforms should create a fair playing field.**

Mobile platforms shouldn't use app developers' data to unfairly compete. They shouldn't unfairly preference their products over those of other developers. And mobile platforms should be clear about the rules of the road, with clear guidelines for developers that are enforced consistently with clear means of redress and appeal.

**6. We believe mobile platforms have a responsibility to keep consumers safe.**

Consumers count on mobile platforms to keep them safe. That means investing in protections against malware, unauthorized data access, harmful and illegal content, and payments abuse and other fraud. Mobile platforms should demand that app developers meet consumer expectations by upholding high standards of consumer safety.

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#### Platform and software.

Principles for ensuring platforms are successful - safe and secure for users and innovation for developers while also enabling platform makers to run a business. These have been framed as opposing forces -- we don't believe they need to be.

#### Software distribution should be open, and safe.

- \* No one should have a lock on distributing software.

- \* Allow multiple stores

- \* Allow users to load directly.

- \* Must be done safely for consumers.

- \* Side loading can be dangerous. Platforms should provide safety services and warn users. All modern OSes do this

- \* Running a store and keeping it safe isn't easy. As an example the epic installer bypasses the platforms runtime permissions for apps installed. This isn't right. There need to be a set of rules those who want to install software follow.

Developers should be able to talk with their customers and have a direct relationship.

- \* Communication in app and out of app is fine.

- \* Allow billing choice. Some already have a relationship

- \* But all this needs to be done safely. Platforms need to be able to provide users services like parental controls. And when consumers earn loyalty points or buy a gift card they need to know where and how they can use those instruments.

The Playing field should be fair.

Platforms can be run as a business.

- \* We give android away for free.

- \* We do not charge for the licensing of our apps.

- \* We don't make money on the sale of the device via a software license (like windows) or via the device price itself.

- \* In fact, we share revenue with carriers and oems who build networks and devices.

- \* Our model is well aligned with our partners.

- \* We can reduce the bill costs from our fee if a partner wants to process their own payments.

Google



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## Communication Plan - Timeline required for Global Announcement before Korea Law Passes

- **August 9 (internal):** Go/No Go to lean in on Billing Optionality before KR Bill passes
- **Week of 8/16:** Global blog post (Android/Play Choice/openness, Intent/future plans)
- **Aug 17-27:** Time frame for Bill to pass
  - 8/17: Earliest day law could pass
  - 8/23: Expected day to pass (assumed for rest of schedule)
- **August 23-27:** Google team requests clarity on new law
- **Sept 1 - Sept 15:** Law will go into effect
- **TBC:** Ongoing Comms
  - Details on new model
  - GAPP strategy

Google



Id	Date	Text
2	08/03/2021 14:55:45	<div>@kghanem@google.com @jacksondan@google.com</div> <div>Privileged - Confidential</div> <div>Per convos today, dropped in a proposed high level timeline for the 'preferred' global approach, focused on KR timeline.</div>

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## [Backup] Considered three other options. 'Apps only' may put unnecessary pressure on market definitions

Options considered	Rationale	Why not?
<b>Apps Developers only</b> (KR all developers)	<ul style="list-style-type: none"> <li>● Solves billing choice for Apps ahead of policy compliance date</li> <li>● May buy more time to ensure strong T&amp;S protections for games developers outside of Korea (if legislation passes)</li> <li>● Sequencing &gt; may influence outcomes outside of KR - who &amp; how billing optionality is regulated for Games specifically</li> <li>● May help draw a clearer distinction between Apps &amp; Games</li> <li>● Enables investment in games to proceed without interruption</li> <li>● Narrows potential user risk</li> </ul>	<ul style="list-style-type: none"> <li>● Likely non-compliant in KR &amp; US if legislation passes</li> <li>● Continued agitation from some games devs (eg. Epic) put pressure on 'market definitions'</li> </ul>
<b>Subscription only</b> developers (KR all developers)	<ul style="list-style-type: none"> <li>● Narrows potential user risk</li> </ul>	<ul style="list-style-type: none"> <li>● Not-compliant in KR &amp; US if legislation passes</li> <li>● Many devs offer both subscriptions + IAP; this would significantly limit business flexibility / not resolve choice concerns</li> </ul>
<b>Subsegment of 'proven' developers</b> (KR all developers)*	<ul style="list-style-type: none"> <li>● Narrows potential user risk</li> </ul>	<ul style="list-style-type: none"> <li>● Not compliant in KR &amp; US if legislation passes</li> <li>● Challenge of defining 'proven' developer segment</li> </ul>

\* This could be a requirement overlaid on other options ie. subsegment of Apps + Games, Apps only etc.

Google

Kara

Dimensions of pricing . . .

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## [Backup] Comm strategy options pending business model decision

Options	Rationale	Why not?
Blog supporting <a href="#">Billing Optionality Globally</a>	<ul style="list-style-type: none"> <li>● Clarifies our plan going forward</li> <li>● Sets expectation with Developers developers on our response to the current KR bill.</li> <li>● Enables GAPP team to have direct conversations with regulators on impacts of bills and Google's perspective</li> </ul>	<ul style="list-style-type: none"> <li>● Hold if we are not ready to commit to business model changes</li> </ul>
<a href="#">Reactive Statement</a> (no associated blog) Use if we are undecided on long term plan.	<ul style="list-style-type: none"> <li>● Only use if we believe we are likely to come out supporting billing optionality approach in the next month, but are not yet ready for the full announcement</li> </ul>	<ul style="list-style-type: none"> <li>● Allows Developers pushing for the Bill a positive press cycle w/o response from Google</li> <li>● Does not make any clear Google POV.</li> </ul>
Blog post on <a href="#">"Flawed Bill"</a> focusing on value of GBP ( <a href="#">earlier draft</a> )	<ul style="list-style-type: none"> <li>● Agreement that we would not embrace billing optionality in the short term.</li> </ul>	<ul style="list-style-type: none"> <li>● Requires we maintain stance against any billing optionality</li> </ul>

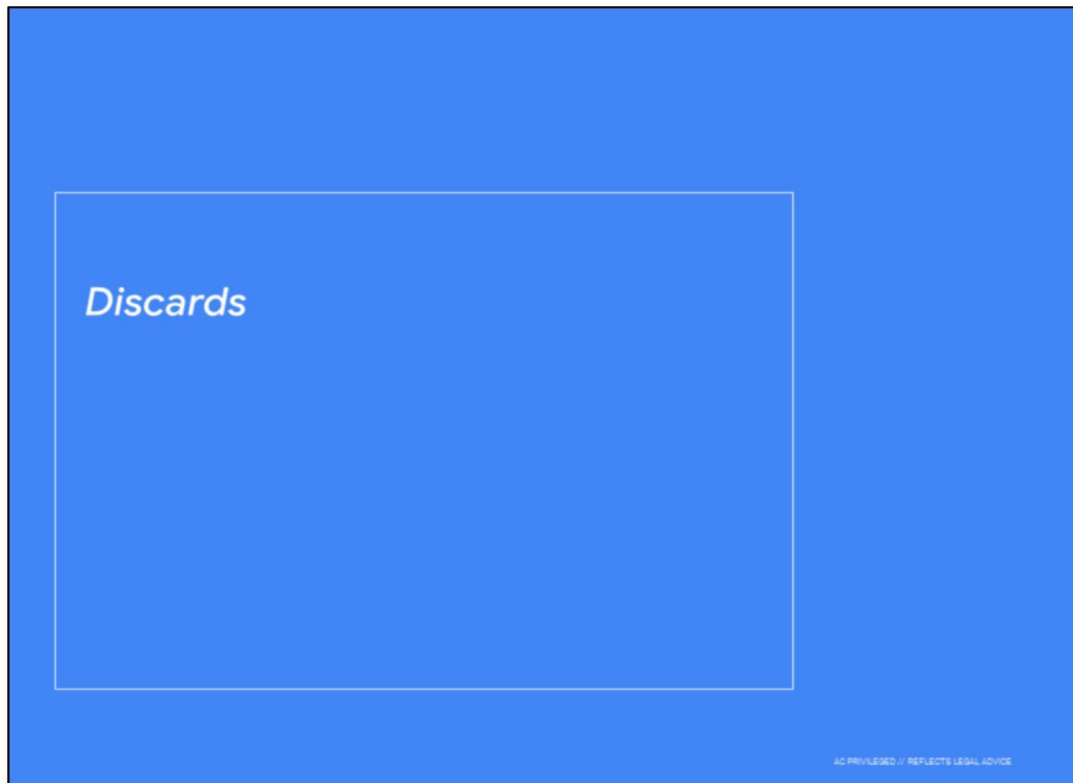
\* This could be a requirement overlaid on other options ie. subsegment of Apps + Games, Apps only etc.

Google

Kara

*Dimensions of pricing . . .*

Id	Date	Text
3	08/03/2021 15:26:14	<p>@kghanem@google.com @jacksondan@google.com @ericafox@google.com @gavinbaird@google.com</p> <p>Privileged + Confidential</p> <p>Per discussion yesterday, attempt to summarize different comm approaches considered to date. Surfaces back up plan (reactive statement) if we don't have clear path on billing optionality.</p>



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**Draft WIP: Discussion only**

## Proposed: Offer Optionality to Apps AND Games devs

### Rationale

- Most consistently & coherently differentiates Play
  - Reinforces Android/Play **choice** narrative > we're the open/choice platform (differentiation vs. competitors)
  - Breaks the false equivalence between billing & price
  - Cements "one size does not fit all" argument;
  - Clear and simple message & approach for developers, many who operate globally
- Maximizes our influence with legislation
  - Get ahead of legislation (outside of Korea - US, DMA); address choice agitation now
  - May help influence legislators to consider a multi-platform approach to gaming (eg. inc. console)

Concerns	Mitigations
● Draws attention to price	<ul style="list-style-type: none"> <li>● Shift to attention on Price (esp. In games) may be valuable</li> <li>● Proposed pricing changes will include games</li> </ul>
● Largest user impact (T&S, features)	<ul style="list-style-type: none"> <li>● Mitigate T&amp;S / features impact with <b>qualification</b> / <b>integration</b> requirements</li> <li>● Focus on continuing to deliver value to devs / users to keep devs on GPB.</li> </ul>
● Option value lost; Too large of a give, too soon.	<ul style="list-style-type: none"> <li>● Not addressing games likely temporary</li> <li>● Impact can be mitigated by continuing to deliver value, keeping devs on GPB.</li> </ul>

Google

*Risks of this approach:*

*Lost opportunity to test & learn in KR first*

*Legislative/regulatory agitation may shift to mechanic for optionality and price (no solve on price for games)*

*Game developers de-integrate*

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## Recommendation: Enable billing optionality to all developers globally

Criteria for Eligibility	Pros
All Developers; all markets	<ul style="list-style-type: none"> <li>● Get ahead of legislation (outside of Korea - US, DMA); address choice agitation now</li> </ul>
Requirements will apply*	<ul style="list-style-type: none"> <li>● Reinforces overall Android/Play choice narrative &gt; we're the open/choice platform: differentiation vs. key competitor</li> <li>● Breaks the false equivalence between billing &amp; price; have strong pricing arguments on games</li> <li>● Cements argument for charging differently across segments/types based on segment characteristics and services/value</li> <li>● Clear and simple message &amp; approach for developers, many who operate globally</li> <li>● Proactive engagement on billing choice now may help influence legislators to consider a multi-platform approach to gaming (eg. inc. console)</li> </ul>

\* Covered on p.9

Google

*Risks of this approach:*

*Lost opportunity to test & learn in KR first*

*Legislative/regulatory agitation may shift to mechanic for optionality and price (no solve on price for games)*

*Game developers de-integrate*

Id	Date	Text
4	08/02/2021 17:52:36	Verify slide reference / add in link. <span>Privileged - Confidential</span>
5	08/02/2021 21:39:25	@pfeng@google.com This may be simpler and clearer given Tian's feedback?



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## Summary : Billing Optionality

Who: Offer Billing Optionality to **all eligible APPS & GAMES devs**

Why:

- Consistency of choice is valuable
- Maximizes our influence in current environment

How:

- User experience (T&S, features)
  - API integration required to ensure user features and T&S
  - Dev Eligibility based on developer good standing, basic level of customer service capabilities
- GPB Optional? [Two options to discuss - 3P billing alone or 3P billing with GPB optional] - TBD

\* Covered on p.9

Google

*Risks of this approach:*

*Lost opportunity to test & learn in KR first*

*Legislative/regulatory agitation may shift to mechanic for optionality and price (no solve on price for games)*

*Game developers de-integrate*

Id	Date	Text
6	08/03/2021 18:14:46	<div><div>@pfeng@google.com</div><div>I don't think we should lead with this given yesterday's feedback. I think we should have as a summary at the end or leave out for now.</div></div> <div>Privileged - Confidential</div>

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## And we have significant reasons to maintain our service fee for Games either when using GPB or not

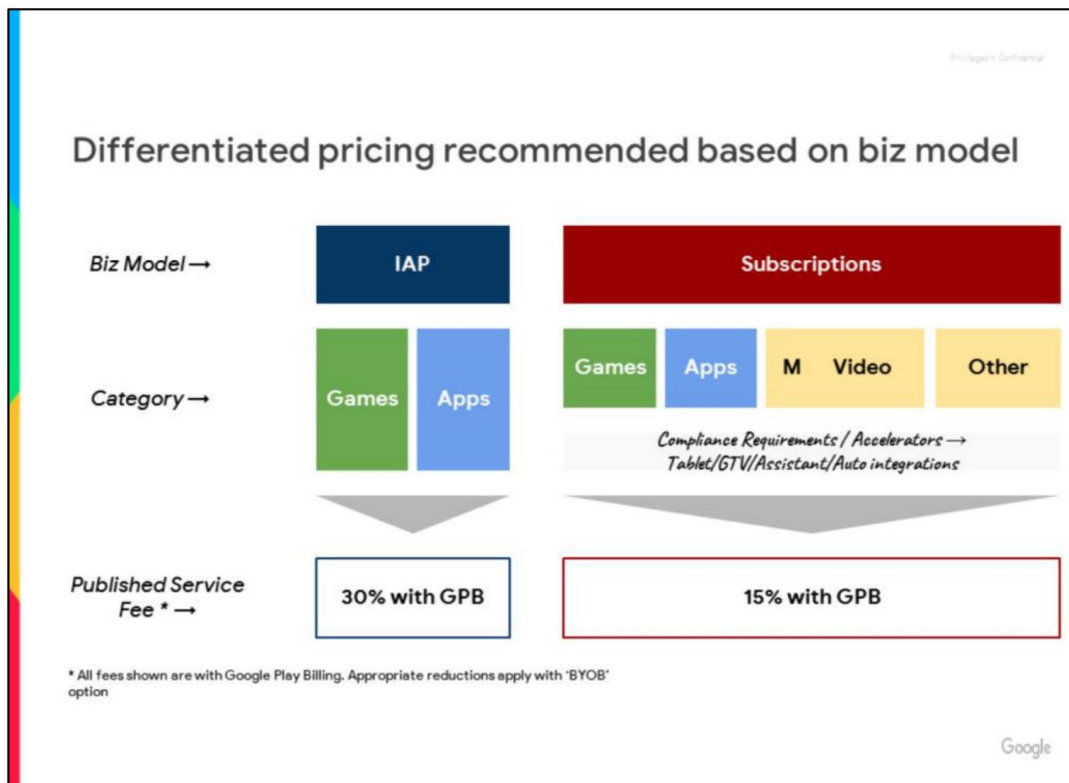
<b>Monetization</b>	Primarily IAP	
<b>Competitive set</b>	<ul style="list-style-type: none"> <li>● Playstation, X-box etc.</li> <li>● Twitch, Steam</li> <li>● App Store, Galaxy store, One Store etc.</li> </ul>	
<b>Service fee structure</b>	<ul style="list-style-type: none"> <li>● Established competitive environment &amp; economic/business model for games</li> <li>● Primarily Transaction based service fee @30%</li> <li>● Service fee covers all services/value provided, including billing</li> </ul>	
<b>Services provides</b>	<b>Apps &amp; Games</b> <ul style="list-style-type: none"> <li>● Global distribution &amp; discovery</li> <li>● Global user acquisition, engagement and retention mechanics/tools</li> <li>● Seamless &amp; easy user payments capability w/Points rewards &amp; redemption and fraud protection</li> <li>● Safety features: Family link</li> </ul>	<b>Additional Games focussed</b> <ul style="list-style-type: none"> <li>● Pre-registration and launch support; liveops support through title lifecycle, including Play funded targeted promotions (credit, points)</li> <li>● Brand/IP protection - the 'real thing'</li> <li>● Games performance drivers: High quality game recommendations, high quality graphics drivers</li> <li>● Multi-platform gaming capability inc. Dynasty, B*, Play Games Platform [FUTURE]</li> <li>● Safety features: budgeting controls</li> <li>● [Future - GPB only?] Enhanced gaming community</li> <li>● [Future - GPB only?] Additional developer features</li> </ul>

Google

Kara

Dimensions of pricing . . .

Id	Date	Text
1	08/03/2021 19:54:15	note that this is true of consoles and mobile gaming platforms. PC has variance <small>Privileged + Confidential</small>



**Redacted - Privilege**

**Redacted - Privilege**

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## Differentiated pricing recommended based on biz model and underlying economics

Category →	Games IAP	Apps IAP	Music	Video	Books	Subscriptions		
Service Fee * →	15% for first \$1M 30% thereafter		15% for first \$1M 30% / 15% thereafter					
			Media Experience Program		Subs Accelerator			
			Content Creator Program - Application based					
Effective Fee * →			[REDACTED] 15%					

\* All fees shown are with Google Play Billing. Appropriate reductions apply with 'BYOB' option

Google



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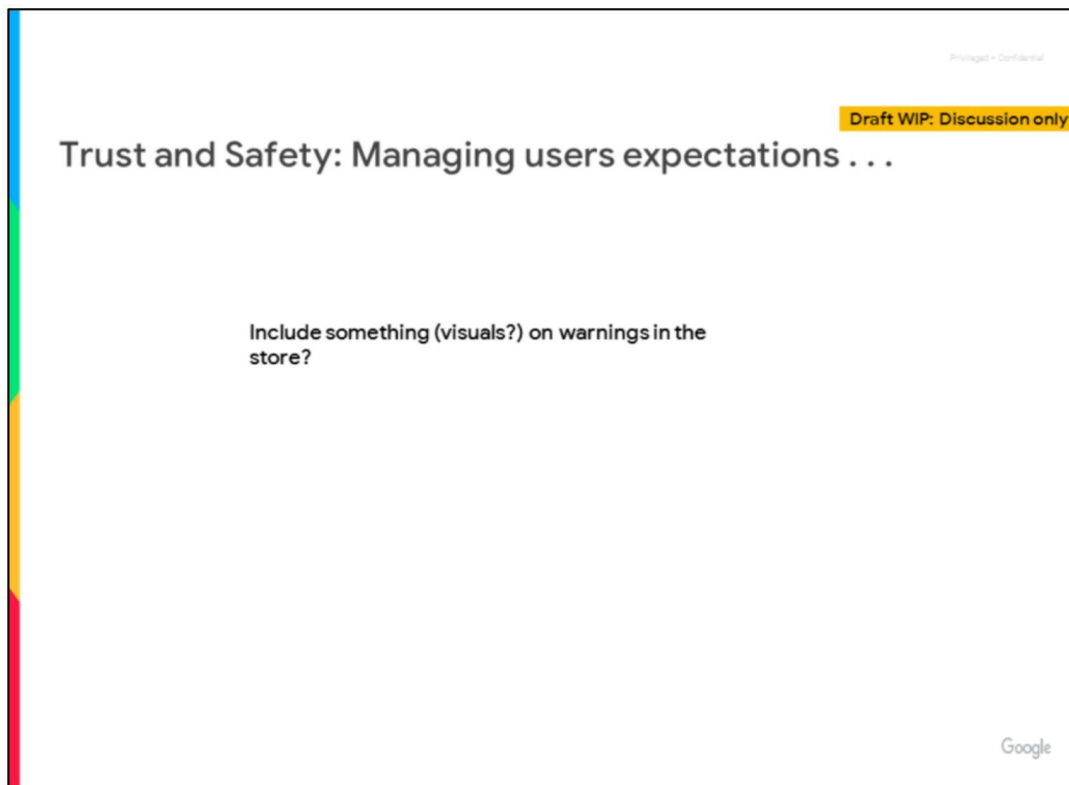
# Trust and Safety: What's possible with 3P billing standalone . . .

What We're Planning	Remaining risks (can't be mitigated)
<ul style="list-style-type: none"><li>● Requirements/standards for . . . .</li><li>● API that does:</li></ul>	<ul style="list-style-type: none"><li>● User dissatisfaction if not able to use Gift cards / spend points with a developer [Medium?]</li></ul>

Google

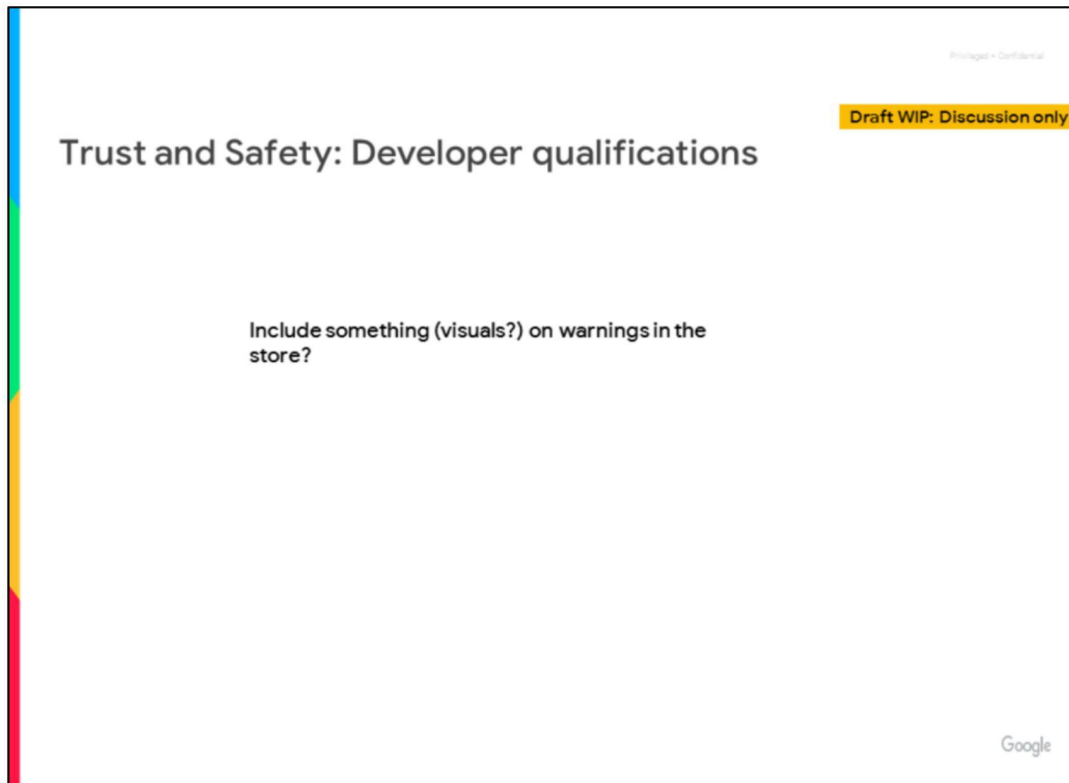
Kara  
Dimensions of pricing . . .

Id	Date	Text
7	08/01/2021 18:49:14	Consider whether we want to add in dev risk vs Play risk <span>Privileged - Confidential</span>



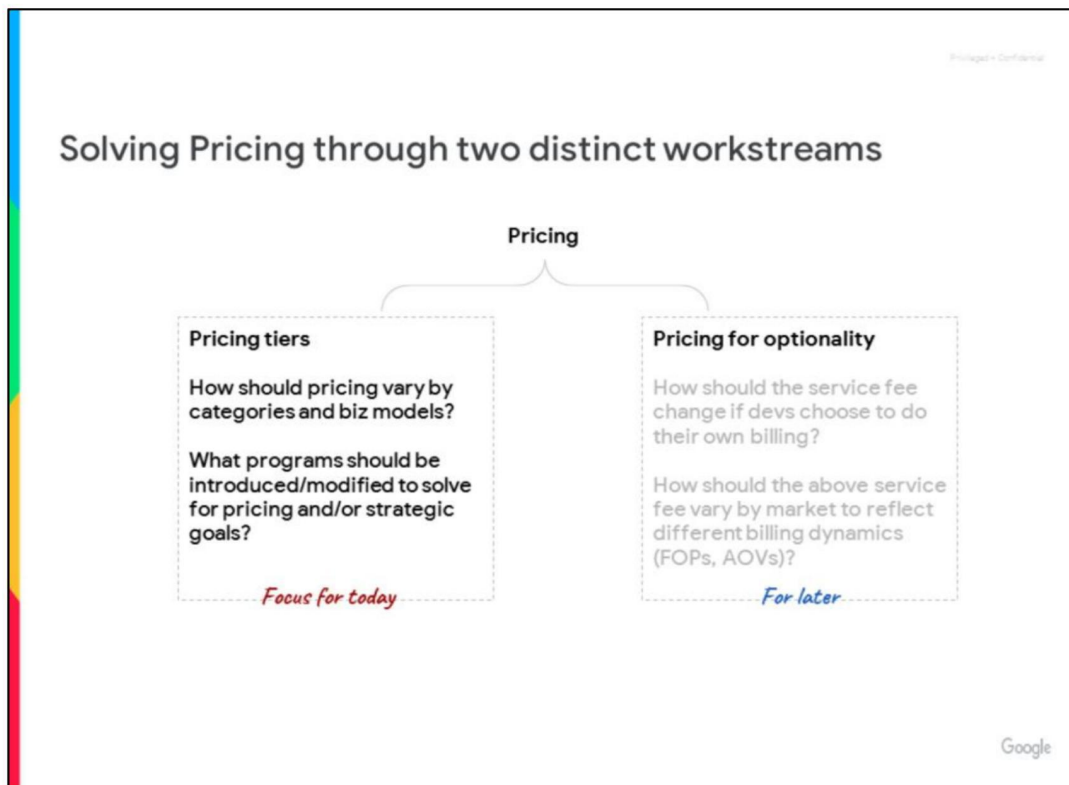
*Kara*  
*Dimensions of pricing . . .*

Id	Date	Text
8	08/01/2021 18:49:55	Not sure we need this for Tuesday. <span>Privileged - Confidential</span>



*Kara*  
*Dimensions of pricing . . .*

Id	Date	Text
3	08/02/2021 20:23:18	@mloew@google.com - could use your help (+maybe gUP, legal, etc) to define qualifications for who can get access to 3P billing. Should be able to require some level of customer service, user trust, etc.
9	08/02/2021 20:23:18	<a href="https://docs.microsoft.com/en-us/windows/uwp/publish/store-policies#108-financial-transactions">https://docs.microsoft.com/en-us/windows/uwp/publish/store-policies#108-financial-transactions</a> Microsoft requirements fyi.



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## Rationale for Creator Platform Accelerator

**Play keeps 30% of Net**

<b>Eligibility</b>	Published % shared with creators Supports >1000 creators, musicians, artists Over 50% of income is from creator content
<b>Aligns with Principles</b>	Play has always intended to keep 30% of what an app makes. Our Media Experience program was a step in that direction, however, we've realized: <ul style="list-style-type: none"> <li>● The rates need to vary with the app / industry</li> <li>● Emerging creator platforms require us to broaden the reach of the media program</li> </ul>
<b>Accelerator Learnings</b>	Music & Books apps with high shares paid out haven't signed / migrated to Google Play.
<b>Allyship</b>	<ul style="list-style-type: none"> <li>● Opportunity to align with new, emerging segment of developers that may become escalations due to policy enforcement</li> <li>● Ability to reset economics in challenging verticals like Music</li> </ul>
<b>CONS/Risks</b>	<ul style="list-style-type: none"> <li>● Other developers face similar margin concerns e.g., IP licensing</li> <li>● Not all developers currently publish % shared w/ creators. Would expect them to publish</li> </ul>
<b>Est. Margin cost</b>	██████████ very few of these devs using GPB today

Google

Kara

Considering three new programs to address different segment challenges. Subscriptions at 15% from the first purchase. Most straightforward extension of existing subs policy. A more scaled way to address the affordability and value concerns of the likes of devs such as Match. Risk is contagion to IAP. Cost at ██████████ assuming some behaviour changes in games (██████████ apps; ██████████ games) Content Creator program. Suited to growing segment of 'platform' apps such as ██████████ who have a large creator platform and share the a significant proportion of their sales with creators (usually published rates).

India program a one-off tailored to current IN market conditions as a short term 'boost', providing investment for market development. Still working through full details, including costing.

---

Potential gives and gets with all these programs.

Other potential programs: Better Togethers, Cloud credits / GVP scaled

Costs:

Content creator: ██████████ margin against existing GPB developers, excludes Roblox.



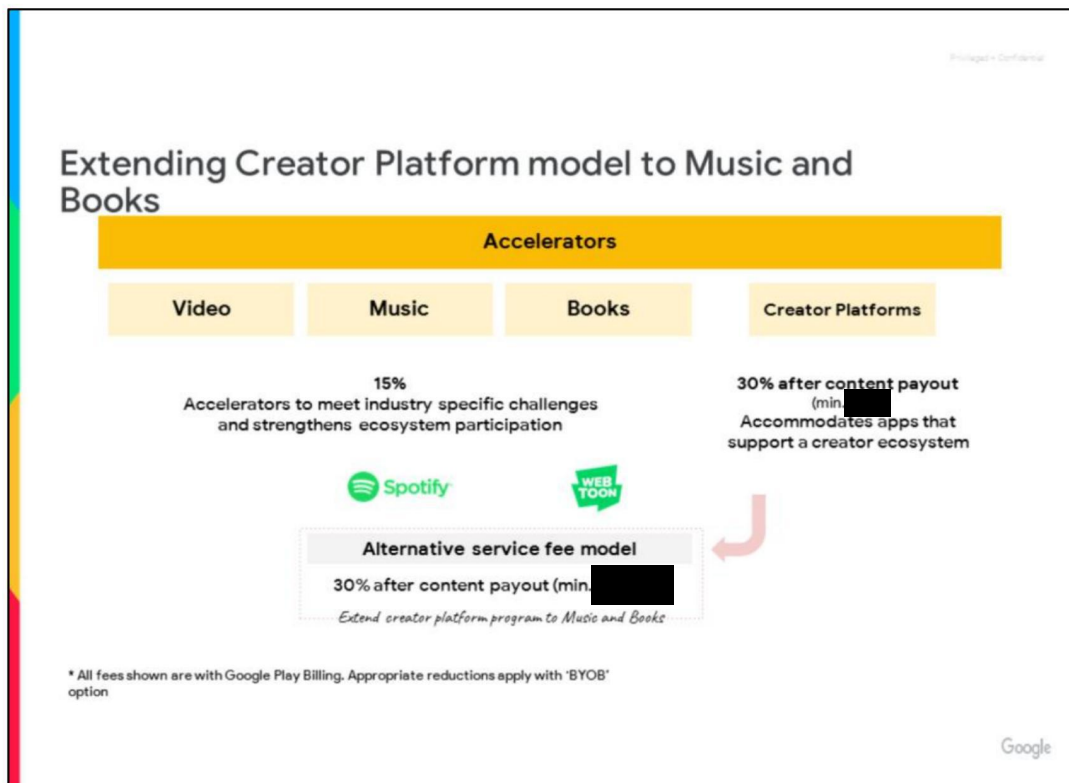
*See Slide 79: Creator Content Program*

*Subs @ 15% immediately: cost is \$zzz for apps + \$zzz for games for a total of \$zzz.*

*Assumes that subscription and IAP spend are unaffected by the new pricing.*

*Notes on figures:*

*Subs revenue growth of 45% is the 2 yr CAGR ending in Q2 2021.*



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Draft WIP: Discussion only

## Recommend extending content creator program to Music and Books

**Play keeps 30% of Net**

<b>Eligibility</b>	Same as original content creator program
<b>Aligns with Principles</b>	<p>Play has always intended to keep 30% of what an app makes. Our Media Experience program was a step in that direction, however, we've realized:</p> <ul style="list-style-type: none"> <li>● The rates need to vary with the app / industry</li> </ul>
<b>Accelerator Learnings</b>	Music & Books apps with high shares paid out haven't signed / migrated to Google Play.
<b>Allyship</b>	<ul style="list-style-type: none"> <li>● Ability to reset economics in challenging verticals like Music</li> </ul>
<b>CONS/Risks</b>	<ul style="list-style-type: none"> <li>● Other developers face similar margin concerns e.g., IP licensing</li> <li>● Not all developers currently publish % shared w/ creators. Would expect them to publish</li> </ul>
<b>Est. Margin cost</b>	TBD

Google

*Kara*

*Considering three new programs to address different segment challenges. Subscriptions at 15% from the first purchase. Most straightforward extension of existing subs policy. A more scaled way to address the affordability and value concerns of the likes of devs such as Match. Risk is contagion to IAP. Cost at [REDACTED] assuming some behaviour changes in games [REDACTED] apps, [REDACTED] (games) Content Creator program. Suited to growing segment of 'platform' apps such as [REDACTED] who have a large creator platform and share the a significant proportion of their sales with creators (usually published rates).*

*India program a one-off tailored to current IN market conditions as a short term 'boost', providing investment for market development. Still working through full details, including costing.*

---

*Potential gives and gets with all these programs.*

*Other potential programs: Better Togethers, Cloud credits / GVP scaled*

*Costs:*

*Content creator: [REDACTED] margin against existing GPB developers, excludes Roblox.*

*See Slide 79: Creator Content Program*

*Subs @ 15% immediately: cost is \$zzz for apps + \$zzz for games for a total of \$zzz.*

*Assumes that subscription and IAP spend are unaffected by the new pricing.*

*Notes on figures:*

*Subs revenue growth of 45% is the 2 yr CAGR ending in Q2 2021.*

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Key Developers benefitting from Subs Pricing

Draft WIP: Discussion only

	Today				Tomorrow
	GPB	Fee	Sentiment	Subs	Fee
Match	No	28% + AVP	Agitate	Majority	~18% (blended IAP)
	No	30%	Agitate	?	15%
	Yes			100%	15%
					15%
					15%
					15%
					15%
	Yes	30%		100%	15%
	Yes				15%
	Yes				15%

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Key Developers Benefitting from Content Creator Program

Draft WIP: Discussion only

	Today				Tomorrow
	OPB	Fee	Sentiment	Creator (share)	Fee
Bandcamp	No	30%	Expressed Concerns	Y (85%)	
	Yes	30% + GVP	Compliant + concerns	Y (30%)	21%
Bandcamp	No	30%	?	Y (85%)	
	No	30%	Expressed Concerns	Y (85%)	
	No	30%	Willing. Fairness Concerns for UGC	Y (40%)	18%
	No	30%	Fairness Concerns for UGC	Y (40%)	18%
	No	15% (BCAP)	Agitate	Y (50-70%)	12%

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Key Media Developers benefitting from alternative service fee

Draft WIP: Discussion only

	Today				Tomorrow
	GPB	Fee	Sentiment	Creator (share)	Fee
	No	15% (ADAP)	Agitate	Y (70%)	
	No	15% (ADAP)	?	Y (70%)	
	No	15% (BCAP)	?	Y (70%)	
	No	15% (BCAP)	Agitate	Y (50-70%)	
	No	15% (ADAP)	Agitate	Y (85%)	
	No	15% (ADAP)	Agitate	Y (85%)	

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## Evaluating pricing options to achieve different objectives

Objective	<ul style="list-style-type: none"> <li>● Solve for subs biz model consistently; broad base agitation in an operationally effective way</li> <li>● Differentiate from Apple</li> <li>● Benefit from the PR narrative</li> </ul>	<ul style="list-style-type: none"> <li>● Solve for dev agitation in select categories conditionally (based on gives/gets)</li> <li>● Incentivize x-platform integrations</li> </ul>
Solution	Revise Subs service fee to 15% & Continue the current accelerators	Expand accelerators to more categories (Health & Fitness, Dating etc) with a service fee of 15%
Beneficiaries	All devs with a subs biz model, including those with IAP / subs hybrid model	Devs in select categories, regardless of biz model
Risks / Cons	<ul style="list-style-type: none"> <li>● Undermines the accelerator programs and the x-platform integration incentives</li> <li>● Benefits extend to game devs on a subs biz model</li> </ul>	<ul style="list-style-type: none"> <li>● No significant PR gains from the accelerator programs?</li> <li>● Varying degrees of gets/integrations required for the same benefit</li> <li>● Dev agitation span many app categories</li> <li>● Agnostic to the business model and benefits all devs in the accelerator categories</li> <li>● Does not create meaningful acknowledgement and differentiation from Apple</li> </ul>
Mitigation	<ul style="list-style-type: none"> <li>● Current media accelerators incrementally benefit the IAP Apps/SKUs in the desired verticals</li> <li>● Shift accelerator incentives from service fee to other instruments (eg annual payout, discovery)</li> </ul>	<ul style="list-style-type: none"> <li>● Messaging is critical - need to land the 'not a one size fits all approach'</li> </ul>
Margin Impact		

Google



Id	Date	Text
5	08/03/2021 16:16:20	KB FB: This could also be considered a pro, having consistency across the platform. <sup>202</sup> - Confidential

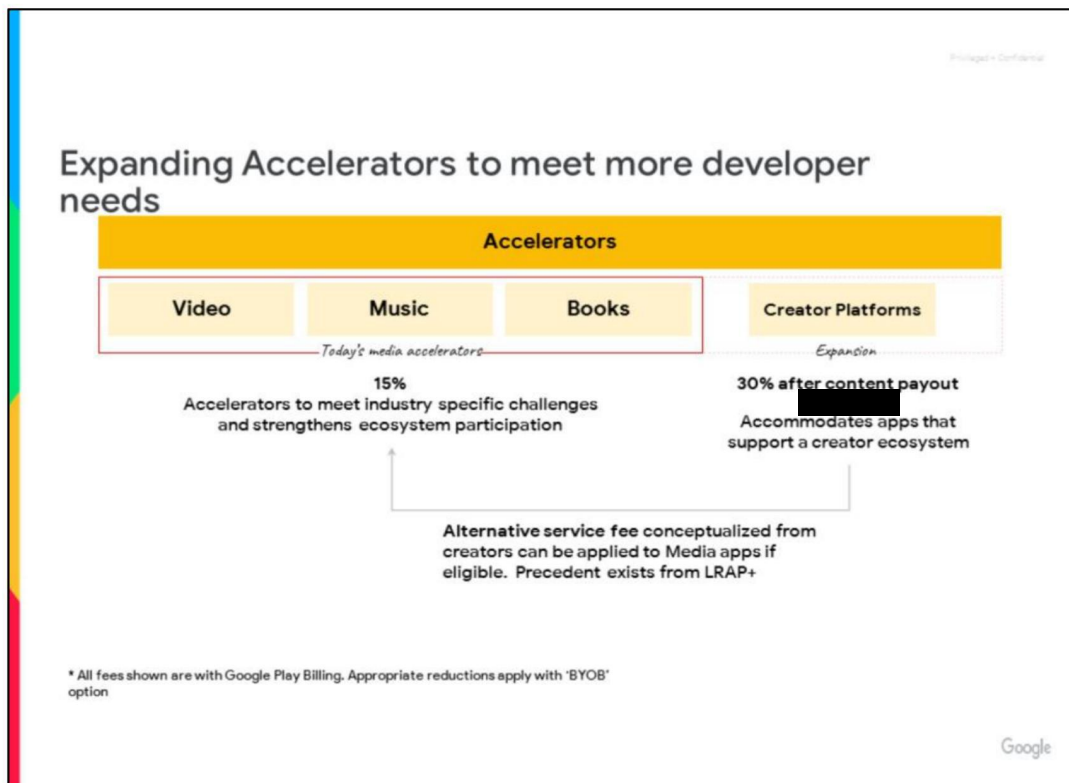
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## Expanding Accelerators to meet more developer needs

Accelerators					
Eligibility	Video	Music	Books	Other	Service fee
Creator payout >25%				Spoonradio, Afreeca TV, Roblox	20%
Creator payout >40%	Twitch				15%
Creator payout >60%		Spotify, Kakao Music, Naver Vibe	Webtoons, Kakao Page		10%
Creator payout >80%					

\* All fees shown are with Google Play Billing. Appropriate reductions apply with 'BYOB' option

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## Expanding Accelerators to meet more developer needs

Accelerators					
Eligibility	Service fee	Video	Music	Books	Other
Creator payout >25%	20%	Afreeca TV	Spoonradio		Roblox
Creator payout >40%	15%	Twitch			
Creator payout >60%	10%		Spotify, Kakao Music, Naver Vibe	Webtoons, Kakao Page	
Creator payout >80%					

\* All fees shown are with Google Play Billing. Appropriate reductions apply with 'BYOB' option  
 Creator payout rates need to be published and verifiable

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## Expanding Accelerators to meet more developer needs

Accelerators				
Share %	Service fee	Video	Music	Books
Creator payout > 25%	20%	Afreeca TV	Spoonradio	
Creator payout > 40%	15%	Twitch		
Creator payout > 60%	10%		Spotify, Kakao Music, Naver Vibe	Webtoons, Kakao Page
Creator payout > 80%		Hulu, Sling	Bandcamp	

\* All fees shown are with Google Play Billing. Appropriate reductions apply with 'BYOB' option  
 Creator payout rates need to be published and verifiable

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## Expanding Accelerators to meet more developer needs

Using industry / segment rationale

Accelerators				
Service fee	Video	Music	Books	News
15%	Premium Video & SVOD (Disney*) Creator Video Platforms (Twitch, Afreeca TV)	Creator Audio Platforms (Spoonradio)		News
	Live TV (Hulu, Sling)	Premium Music (Spotify, Kakao Music, Naver Vibe, Bandcamp)	Webtoons, Kakao Page	

\* All fees shown are with Google Play Billing. Appropriate reductions apply with 'BYOB' option  
 Creator payout rates need to be published and verifiable

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## Expanding Accelerators to meet more developer needs

Accelerators			
Service fee	Video	Music	Books
15%	Afreeca TV		
10%		Spoonradio, Spotify, Kakao Music, Naver Vibe	Webtoons, Kakao Page

\* All fees shown are with Google Play Billing. Appropriate reductions apply with 'BYOB' option  
 Creator payout rates need to be published and verifiable

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Expanding Accelerators to meet more developer needs

2

Eligibility

Category based accelerators (with gives & gets)

Video

Music

Books

1

Creator payout >25%

20%

Creator payout >40%

15%

Creator payout >60%

10%

Creator payout >80%

1. For developers with published rates

1. For developers not meeting above criteria then specific gives/gets by category

\* All fees shown are with Google Play Billing. Appropriate reductions apply with 'BYOB' option

Creator payout rates need to be published and verifiable

Google